

**Wednesday, September 25, 2024**

8:00 a.m. to 2:00 p.m.

Location:

**Florida Atlantic University**

Student Union Building

777 Glades Rd

**Boca Raton, FL 33431**

Live Oak Pavilion – Rooms C&D

Adjunct Lecturer Presenting:

**Shir McGettigan, C(k)P®**

**BLS Wealth Management, a HUB International Company**

<b>The Plan Sponsor University – Agenda</b> <i>The C(k)PF / The Certified 401(k) Plan Fiduciary Designation</i>		
8:00 – 8:30	<b>Breakfast / Registration</b>	<b>Registration &amp; Sign-in</b>
8:30 – 8:55	<b>Introduction</b>	<b>Introduction to The Plan Sponsor University</b> <i>Fred Barstein, C(k)P – The Plan Sponsor University</i>
8:55 – 9:55	<b>Session 1</b>	<b>Presentation by Adjunct Lecturer</b> <b>The Roles Within a Retirement Plan</b> <i>Shir McGettigan, C(k)P – BLS Wealth Management</i>
9:55 – 10:05	<b>Break</b>	
10:05 – 10:50	<b>Session 2</b>	<b>Keynote Presentation</b> <b>Misbehavin’ in Retirement Plans</b> <i>John Doyle – American Funds</i>
10:50 – 11:35	<b>Session 3</b>	<b>Panel Discussion with Industry Professionals</b> <u>Moderator:</u> <i>Shir McGettigan, C(k)P – BLS Wealth Management</i> <u>Panelists:</u> <i>Natasha Branzanti – Empower</i> <i>Stewart Durant – HUB International</i> <i>Mica Fisher – Fidelity</i> <i>Sam Fuller – Paylocity</i> <i>MJ Zayac – Alliance Bernstein</i>
11:35 – 11:50	<b>Break</b>	<b>Pick up your Lunch – Sponsored by JP Morgan</b>
11:50 – 1:15	<b>Session 4 (Working Lunch)</b>	<b>What is Working in Today’s 401(k) Plans?</b> <b>What is Not Working in Today’s 401(k) Plan?</b> <u>Group Discussion Leaders:</u> <i>Rob Ireland – T. Rowe Price</i> <i>Perry Lazarus – Transamerica</i> <i>Carlos Lopez &amp; Lindsey Zimmerman – Principal Financial Group</i> <i>Amy Thomas – Vanguard</i> <i>Jim Gilligan – The Standard</i>
1:15 – 1:45	<b>Session 5</b>	<b>The Ideal Plan - Interactive Discussion</b>
1:45 – 2:00	<b>Closing</b>	<b>The C(k)PF Designation and Closing Statements</b>
<i>Agenda is Subject to Change</i>		